THE PROPOSITION A STORY

How Los Angeles County Voters Gained \$540 Million for Parks, Recreation, and Natural Lands

A Handbook for Designing Your Own Ballot Measure and Creating a Landscaping and Lighting Act Assessment District

By Esther Feldman

A PUBLICATION OF THE TRUST FOR PUBLIC LAND

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By Esther Feldman
For The Trust for Public Land

SPECIAL THANKS TO THE FOLLOWING PEOPLE WHO HELPED MAKE PROPOSITION A POSSIBLE:

The Honorable Frank Hill The Honorable Edmund D. Edelman Carolyn Barr Corey Brown Peter Detwiler Joseph T. Edmiston Steven Glazer Carlyl Hall Joscelyn Herzberg Richard M. Jones Steve Kelly Jerry Meral Dean Misczynski Jim Moore Larry Remer Xavier Sibaja



ABOUT THE TRUST FOR PUBLIC LAND

The Trust for Public Land is a national nonprofit land conservation organization dedicated to protecting land for people where they live, work, and play. Since 1972, The Trust for Public Land, working with government agencies and community groups, has preserved over 700,000 acres of land with environmental, recreational, historic, and cultural significance. This publication was developed as part of The Trust for Public Land's ongoing effort to provide information on land conservation and creative financing techniques to government agencies, land trusts, and others active in the land conservation field. For more information, please contact the Western Regional Office of the Trust for Public Land.

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Introduction

Introduction

In November of 1992, 64% of Los Angeles County voters approved Proposition A, the Los Angeles County Safe Neighborhood Parks Act. Proposition A provided \$540 million to buy new park and natural lands, improve parks, beaches and recreation facilities, build facilities for at-risk youth and gang prevention purposes, restore rivers and streams, build trails and plant trees throughout the county. Placed on the ballot unanimously by the Los Angeles County Board of Supervisors and supported by an unprecedented and diverse coalition of local leaders and organizations, Proposition A is a pioneer in the world of providing public funding for parks, recreation, and the conservation and restoration of natural lands.

It is increasingly difficult to find funds to protect our disappearing natural, wildlife, park and recreation lands. Particularly in times of economic hardship and local budget shortfalls, funding for parks, recreation, beaches and natural areas preservation is often the first to be cut. Yet our need for places in which to rest, relax and recreate only increases, and continued urban development pressures threaten many of our remaining natural and wild areas. We all need quiet places in which to take a walk, go for a picnic, jog, ride a bike or just get away from the stress, traffic and urban congestion that we deal with every day.

This need for parks, recreation areas and natural places is perhaps nowhere felt more keenly than in Los Angeles County, home to nine million people and growing, and more park-poor than most of the rest of urban California. While the national average recommended by the National Recreation and Park Association in 1987 was five to ten acres of easily accessible park lands per 1,000 people, many areas in Los Angeles County have as few as one to two acres per 1,000 people. Regional parks frequently have to turn people away on holiday weekends, and easily-accessible natural areas such as mountain and canyon parks are in high demand. Urban growth places increasing pressures on wildlife, making it more and more difficult for a diverse population of plants and animals to thrive.

Proposition A is especially significant for several reasons. The measure is a new and creative use of a very old financing tool - assessments on property - to provide funds for acquiring and improving park, recreation and natural lands. Proposition A creates the largest assessment district in California, combines several different steps into one measure, and was passed by an overwhelming margin in the midst of a recession. Proposition A is also noteworthy because of the unprecedented, bi-partisan and diverse coalition of business, civic, senior, park, environmental, gang prevention and community organizations and leaders who came together to support the measure and its passage.

Introduction

The purpose of this manual is to describe the steps we went through to adapt this financing method for our needs in Los Angeles County, and the various processes necessary to place Proposition A on the ballot. This manual is intended to provide you with an outline and the basic tools for creating a ballot measure of your own to address the park, recreation, wildlife and natural land needs in your own city, county, district or state.

The state laws referenced in this manual apply to California; available financing mechanisms and other relevant laws will vary in each state. However, I would recommend detailed legal review in all instances both in and outside of California to ensure compliance with all applicable state and local laws, and with any new legislation approved after the date of this writing.

I have divided this manual into four basic parts:

- Part I: A description of Proposition A; technical information on Prop A's contents, including the legal, funding, and administrative mechanisms that made the measure possible; a discussion of how Prop A evolved; and the roles of the individuals and organizations that comprised the Prop A team.
- Part II: An outline of the steps you will need to take if you choose to produce a ballot measure and a Landscaping and Lighting Act Assessment District of your own.
- Part III: A discussion of the key components of a successful campaign and issues related to the implementation of the measure.
- Part IV: An appendix (under separate cover) containing a variety of sample documents and other useful information.

This manual is intended as a guideline only. It by no means covers in complete detail the many very technical issues involved in drafting state and local legislation, establishing an assessment district and assessment rate and method or running a successful election campaign. If you decide to create an assessment district and funding measure of your own, you should be sure to consult with the appropriate legal, assessment, public opinion and campaign experts.

The appendix includes copies of some documents which I felt would be useful. You can obtain additional information by calling the Mountains Recreation and Conservation Authority at (310) 456-7807 or the Trust for Public Land at (415) 495-5660.

HELPFUL TERMS AND DEFINITIONS

HELPFUL TERMS AND DEFINITIONS

Special Tax: Used for a specific purpose. Revenues from a special tax are restricted and dedicated to a special use. Requires two-thirds voter approval under Prop 13. An example would be a tax to specifically pay for building hospitals.

General Tax: Used for general purposes. Revenues from a general tax are not restricted and go into an agency's general fund. Requires majority voter approval. An example would be a sales tax.

Assessment: An involuntary charge to property owners which pays for public improvements. These improvements must directly benefit the property being assessed. Also called a "special assessment" or "benefit assessment". Normally no election is required. The procedures for levying assessments are written in state laws.

Assessment District: An area or jurisdiction in which an assessment is being levied on specific properties for specific purposes. In California, assessment districts can be formed by cities, counties, and special districts.

Landscaping and Lighting Act of 1972: One of several assessment laws in California. This act details one type of assessment used for landscaping, street lighting, park and open space purposes. The act lays out the various steps an agency must undertake to levy such an assessment, details the powers and responsibilities of the agency levying the assessment, and specifies the types of improvements the assessment can fund. Assessment districts formed under this act are called Landscaping and Lighting Act Districts. (CA Streets and Highways Code Section 22500 et seq.)

Regional Park and Open Space District: A public agency (and special district) that can be formed under California state law to acquire, develop, improve and restore a wide variety of park, recreation, wildlife and natural lands. Regional Park and Open Space Districts are independent agencies with their own Board of Directors, often cross county lines, and are granted a variety of powers as described in California state law. Formation of the district requires majority voter approval. (CA Public Resources Code Section 5500 et seq.)

Engineer's Report: A formal document prepared by an assessment engineer, and required to form assessment districts. The report must justify the benefit to property being assessed, and must detail the exact formulas used in assessing different types of property. Details of the report are specified in the Landscaping and Lighting Act and in other state assessment laws.

TIMELINE: PROP A

Year 1 (1990-91)

NOV DEC JAN FEB MAR APR MAY JUNE JULY AUG SEPT OCT

Research local assessments, other precedents, prior legislation, local parcel information, legal issues.

Introduce state legislation. Follow bill through state legislative process; ensure adequate legal review and county review.

Detailed local parcel and assessment research specifically pertaining to Los Angeles County.

> Begin mtg. with engineers.

Meetings with all cities, local organizations, local leaders.

Conduct poll.

Form Citizen's Advisory Committee.

Prepare Engineer's Report: gather all data; draft assessment rate and method; legal review. Meetings with all cities, local organizations, local leaders (through Sept.). Compile potential project list.

YEAR 2 (1991-92)

NOV DEC JAN FEB MAR APR MAY JUNE JULY AUG SEPT OCT

Continue Draft local legislation; Engineer's legal review; review by Report cities, county, advisory preparation.

Compile Board takes potential project necessary list; collect all Board hearings. initial actions to form both Board background approves final districts: sets information on public hearing Engineer's projects. dates; approves Report, places Local and city draft engineer's measure on endorsements. ballot. report.

Citizen's Advisory Committee meets regularly through May.

Public information campaign.

CAMPAIGN. Fundraising; media; endorsements.

YEAR 3 (1992-93)

Nov Dec Jan Feb Mar Apr May June July Aug Sept Oçt

ELEC-	Board action directing	
TION.		Implementation.

How Prop A Works

- 1. The measure
- 2. The financing mechanism
- 3. How funds are generated: The Landscaping and Lighting Act District
- How Proposition A is administered: The Los Angeles County Regional Park and Open Space District

PART I:

THE PROP A STORY

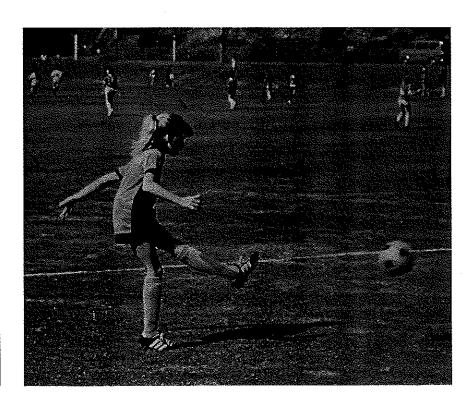
- ♦ How Prop A Works
- ♦ How Prop A Evolved
- ♦ The Prop A Team

How Prop A Works

1. The Measure

Proposition A, the Los Angeles County Safe Neighborhood Parks Act of 1992, is a \$540 million measure that provides funds to purchase, develop, improve and restore park, wildlife, coastal and natural lands and recreation facilities throughout Los Angeles County in California. Proposition A appeared on the Los Angeles County ballot in the November 1992 general election.

Proposition A was made possible by passage of special state legislation in 1991 (see discussion under Part II, State Legislation). Because Proposition A was a local measure, we were able to directly address the specific park, recreation and natural lands needs of Los Angeles County. Proposition A provided an opportunity to make an investment in our communities, to improve



Baldwin Hills Park, Kenneth Habn State Recreation Area. Photo: TPL

How Prop A Works

the quality of life for all residents, and to improve the safety and usability of park and recreation areas throughout the county. Prop A also specifically addressed park and recreation needs in inner-city areas.

Passage of Proposition A accomplished the following things:

- Provided badly-needed funds for the most pressing park, recreation, beach, inner-city and natural areas in Los Angeles County.
- Approved a list of over 100 specific park, beach, wildlife, open space and gang prevention projects and a detailed allocation of all funds to be generated by the assessment.
- Formed the Los Angeles County Regional Park and Open Space District encompassing the entire county of Los Angeles, including all incorporated and unincorporated areas.
- Formed a Landscaping and Lighting Act benefit assessment district, also encompassing the entire County of Los Angeles, under the auspices of the Los Angeles County Regional Park and Open Space District.
- Adopted and levied the assessment as set forth in the engineer's report previously adopted by the Los Angeles County Board of Supervisors.
- Adopted criteria, timelines, limitations and various guidelines for the use of all funds generated by the assessment and for the administration of the district.

2. The Financing Mechanism

Proposition A levies an assessment for twenty-two years (see Definitions) on property throughout the county to generate an annual revenue stream. The county will issue bonds (technically called assessment bonds) or notes to pay for the various capital improvements specified in the measure, and the annual assessments will pay the principal and interest on any bonds issued. Nearly all the money provided by Proposition A will be used to acquire, improve, develop or restore land or facilities. A small amount (15%) of all funds collected annually from the assessments is allocated to operate and maintain land or facilities acquired or improved with funds from the measure. Assessments appear on property tax bills.

3. How Funds Are Generated: The Landscaping and Lighting Act District

Under California law, cities, counties and special districts are allowed to levy assessments on property within each agency's jurisdiction. Assessments, (also known as benefit assessments), can

How Prop A Works

be levied for a variety of different purposes which benefit the properties being assessed. Different assessment laws can be used to fund a variety of projects, including flood control, fire protection, street maintenance, lighting, street landscaping, parks, recreation and open space.

Most of these assessments can be levied without any public vote if the agency levying the assessment follows the required steps, including giving public notice, preparing an engineer's report and holding a public hearing. An agency that wants to levy an assessment forms an assessment district in all or part of its jurisdiction, depending on where the improvements are to be made

Proposition A formed what is officially called a Landscaping and Lighting Act District, which is one type of assessment district permissible in California. There were several key steps necessary to form this district which were carried out in the months before Proposition A was actually placed on the ballot, including amending state law. These steps, and the changes made by the state legislation are discussed later in this manual in Part II: Legal and Legislative Requirements. The Landscaping and Lighting Act District established by Proposition A must conform to the requirements established by state law.

4) How Proposition A is Administered: The Los Angeles County Regional Park and Open Space District

Under existing state law, counties can only levy assessments in the unincorporated areas of a county and cities can only levy assessments within city boundaries. Because we needed to assess property throughout the county, it was necessary to form a special district that would include all the incorporated and unincorporated areas of the county. This special district - in our case, the Los Angeles County Regional Park and Open Space District - was then able to levy assessments in all areas of the county.

Proposition A actually formed two districts simultaneously:

- 1) The Los Angeles County Regional Park and Open Space District, whose boundaries are the same as Los Angeles County's and whose jurisdiction includes all areas of the county; and
- 2) A Landscaping and Lighting Act District (described on the preceding page) which levies the assessment, provides the funding for the specific projects included in Proposition A, and is administered by the Los Angeles County Regional Park and Open Space District.

The Los Angeles County Regional Park and Open Space District is the governing agency which levies the assessment authorized by the Landscaping and Lighting Act, and which oversees all aspects of the assessment and of the specific park projects included in Proposition A.

The state legislation designated the Los Angeles County Board of

How Prop A Evolved

Supervisors to be the Board of Directors of the Los Angeles County Regional Park and Open Space District. The legislation also authorized the county to provide any staff or services necessary to administer the district. The county may be reimbursed for actual administrative expenses incurred.

How Prop A Evolved

In 1990 and 1991, we did an exhaustive analysis of past election results for park, beach, recreation areas and natural lands funding measures in Los Angeles County. Los Angeles County voters had a long history of strongly supporting ballot measures that funded a variety of natural resource protection efforts. This strong support was evident even in times of economic recession. Combined with the results of several extensive polls we conducted between 1989 and 1991, this election history convinced us that the level of voter support was high enough to justify seeking different ways to fund our tremendous and growing local need for parks, beaches, natural lands and recreation facilities.

State Legislation - Adapting to Los Angeles County's Needs

Early in 1991, we began exploring the possibility of using assessments, an old financing mechanism that has been used in California since at least 1909 to fund parks and recreation facilities. We found that assessments were a viable and proven method of funding parks and recreation if certain guidelines were followed. Most assessments were levied by the governing body of the city, county or district who wanted to raise funds for specific, allowable purposes within their respective jurisdictions. Assessments rarely required a public vote.

However, we also found that if we wanted to address the park needs of all areas in Los Angeles County, we needed to form a special district that included all the incorporated as well as the unincorporated areas of the county. This is because cities, counties and special districts can only levy assessments within their respective jurisdictional boundaries. A special district that included all areas of the county could then, under existing state law, levy an assessment in all of those areas.

State legislation was necessary to streamline formation of this special district - (a Regional Park and Open Space District) - to Los Angeles County's needs, to combine formation of the park district with formation of the assessment district, and to place the additional requirement of majority voter approval on any assessment this district would impose. We drafted this state legislation and went through the legislative process. Governor Wilson signed the bill into law in late 1991, making it possible for us to move forward with the county legislation which became Proposition A in 1992. The legislation (SB 659) was authored by

THE PROP A TEAM

Senator Frank Hill (R-Whittier), who provided the leadership and vision to make Proposition A possible. (SB 659, chapter 823 of Statutes of 1991; see California Public Resources Code Sections 5506.9, 5538.9 and 5539.9.) Specific details on this legislation and the steps involved in developing and drafting Proposition A are covered in Part II.

THE PROP A TEAM

There were many key individuals and organizations involved throughout the entire process of making Proposition A a reality. They are listed here by category and by special expertise as an introduction. All of these individuals and organizations were essential to the success of Proposition A. You should be prepared to address each of the areas discussed below if you decide to proceed with forming an assessment district of your own. Additional details on each of these areas are provided in the following pages.

Research and Development: The Mountains Recreation and Conservation Authority was the lead agency in developing Proposition A and getting the measure placed on the ballot. The Mountains Recreation and Conservation Authority (MRCA) is a local public agency dedicated to protecting and providing public access to the mountains, canyons and natural areas in Los Angeles and Ventura Counties. The MRCA is a joint powers authority made up of the Santa Monica Mountains Conservancy (a state agency that protects lands in mountain areas in the Los Angeles County area) and two local recreation and park districts.

Working for the MRCA, I conceived of the original idea of Proposition A, drafted and worked for passage of the state and local legislation necessary to make Proposition A possible, directed the coordination of all groups and agencies in Los Angeles County, and led the campaign to pass Proposition A. The MRCA funded and carried out all of the initial research, development of state and local legislation, preparation of the engineer's report and coordination of local support. This involved three full time staff people (including myself) for one and one half years, and additional staff as needed.

Please note that public agencies may spend staff time and resources to draft and develop a ballot measure up until the time the measure is actually placed on the ballot.

Citizen's Advisory Committee: A countywide citizen's advisory committee was formed to oversee and guide the development of the local measure. This committee was made up of representatives from cities, business leaders, and local civic, environmental, park, senior, gang prevention and youth organizations from all areas of Los Angeles County.

Legal Counsel: There were two very distinct phases for which we needed very different types of legal expertise: the development phase and the election phase, as described below. The types of law involved in each phase are very different, and you cannot afford to skimp on proper legal counsel.

Legislation, Assessment, Engineer's Report, Local Measure:

Legal counsel was provided by Marie Martineau, Masood Sohaili and Richard Jones of O'Melveny and Myers in Los Angeles, as well as by Los Angeles County Counsel. Legal counsel was vital in drafting the state legislation, Proposition A itself, and in reviewing all the legal aspects of the engineer's report and the proposed assessment rate and method. Assessment law is quite complex, and adequate and early legal review is vital to minimize the risks of legal challenges and potentially costly or fatal mistakes.

Election Phase: Legal counsel for the campaign was provided by Philip Recht of Manatt, Phelps, Phillips and Kantor. It is extremely important to make sure that you are in accordance with all applicable state election laws and requirements. There are numerous important legal questions that arise constantly during a campaign, and you need to make sure that an expert in this area of law is on hand to answer them.

Engineer's Report: The engineer's report was prepared jointly by two of the largest and most experienced engineering firms in Southern California who specialize in assessment districts. The work was done by Jeff Cooper and Joan Cox at BSI Consultants, Inc., and William Stookey and Angel Lucero at Willdan Associates.

The Campaign Team:

Esther Feldman, Campaign Director
Xavier Sibaja, Assistant Campaign Director
Steve Kelly, Operations Manager
Janet Michaelson, Research Director
Steven Glazer, Glazer and Associates, Consultant
Jim Moore, J. Moore Methods, Polling
Larry Remer, Primacy Group, Direct Mail Consultant
Philip Recht, Manatt, Phelps, Phillips and Kantor, Campaign
Legal Counsel
Kinde Durkee, Jules Glazer and Associates, Bookkeeping and
Campaign Reporting

THINGS TO REMEMBER

- 1. The goal is to win: Campaign, campaign, campaign
- 2. Think big!
- 3. Listen to the voters: Do a public opinion poll!
- 4. Strength lies in numbers: You need to build a coalition
- 5. Leadership: Someone must be in charge

PART II:

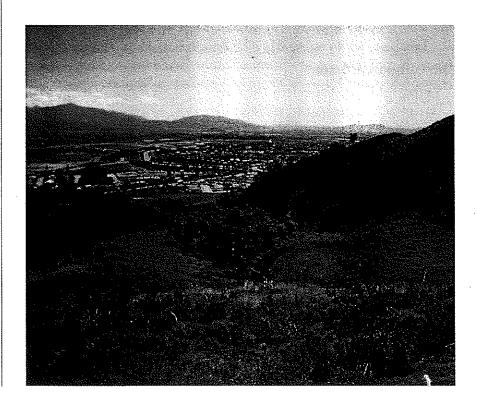
How to Develop Your Own Local Park Assessment Measure

- ♦ Vital Things to Remember
- Getting Started
- Research: What do You Need to Know?
- ♦ Citizen Participation
- ◆ Legal and Legislative Requirements
- ♦ Engineer's Report
- ◆ Legal Review
- Getting on the Ballot

VITAL THINGS TO REMEMBER

1. The Goal is to Win: Campaign, Campaign

You want to win voter approval of your measure, whether it is a regular ballot measure or an advisory vote. You must bear this goal in mind throughout all of your efforts, and throughout every single



O'Melveney Park, Los Angeles. Photo: TPL

THINGS TO REMEMBER

thing you do to carry out the steps discussed in the following pages. There is no point in developing a measure and a financing mechanism that have little or no chance of being passed by voters. Your measure and the technical parts of the assessment and related financing elements must not only be functional; they must also be marketable to the voters.

Keep in mind that you will need to run a campaign. All of your efforts should reflect this goal.

2. Think Big!

There are many different ways to address the park, recreation, open space and related needs in any area. If you have rarely had any local funding sources for your park and park-related needs, there could very well be natural or park-type resources specific to your area that have not been addressed.

Keep an eye out for new ideas that may specifically work in your local area. Examples: recreation facilities for at-risk youth; urban creeks and stream restoration; specific categories of natural lands; wetlands; agricultural land conservation.

3. Listen to the Voters: Do a Public Opinion Poll!

No matter how well you know your area or your field of expertise, there will be pieces of information that you probably never needed to know up until now which are *critical to maximize* your chances of success as you develop a park funding measure. Do not let yourself be deceived by your own expertise. You don't know everything, even though you're an expert. You need to ask questions.

Do a public opinion poll. DO NOT BYPASS THIS STEP! Sure, sure, you say. You know your community like the back of your hand. No surprises here. CAUTION! RED LIGHT! WARNING!

Public opinion surveys, if carried out by an expert with experience in ballot measures and campaigns, will tell you a tremendous amount about what you should and should not do.

Remember, it is *voters* who approve ballot measures, not all members of a community. Polls help you find out what voters think, and, if done well, will provide invaluable information on what voters will and will not support. *You need to know this kind of information if you hope to draft a measure that can win*.

What should you include in your poll? An experienced pollster will help you tailor your poll to the needs and interests of your particular city, county or area. You must make sure to hire a pollster who has experience in conducting public opinion surveys on funding measures and for campaign purposes. At a minimum,

THINGS TO REMEMBER

you should poll to find out answers to the following questions.

- What types of park, recreation or natural lands projects will voters pay for?
- Which specific projects do voters dislike?
- What total dollar amount will they support?
- What level of assessment or fee will they support?
- What subject areas are most and least important to voters?
- ♦ Who are your voters and what is their voting history?

See the additional discussion on polling in this section, under Research.

4. Strength Lies in Numbers: Why You Need to Build a Coalition

It is very important to begin building a team and a coalition of support right away. The more people who feel they have a hand in developing your measure, the greater the support you will have when you get to public hearings and the campaign. A broad base of support increases the strength of your measure as well as your chances of winning. It takes a long time to communicate with the diverse organizations and leaders in any community, but you should look at this effort as a fundamental part of your overall project. It is vital to take the time to communicate with and gain the support of representatives from all areas of the community as you move forward.

The key to building a strong coalition is to *listen*. Regardless of what your primary interest might be, it is very important that you be attentive and sensitive to the needs of the many different organizations in your community. You can make your measure inclusive enough to satisfy the needs of a variety of groups, and this will only make your measure and therefore your efforts stronger.

If you take the time to build a coalition from the very beginning, you will create a group willing to help in the development of your measure and in the campaign.

Diversity is a key element in building a successful coalition. Do not limit yourself to building support only within traditional park, recreation or environmental groups. There are many different civic and community leaders and organizations whose interests and needs can be addressed in your measure. Your polling will help identify subject areas which have public support, and will also identify those groups and individuals whose support you need. Listen to your poll!

5. Leadership: Someone Must Be In Charge

One person must direct all aspects of the drafting and development of your measure, and must be aware at all times that there will need to be a campaign phase to ensure passage of the measure. It is important to have one person overseeing the entire project to ensure continuity and to ensure that all the details involved are accounted for.

You must bear in mind that, if your measure is placed on the ballot, someone must be ready at that point to raise funds, run an election campaign and to lead the efforts to pass the measure. Fundraising is a key component of a successful campaign and must be well planned and executed.

Drafting phase and use of public funds: Public agencies may spend funds and may allocate staff time to develop and draft legislation and ballot measures up until the time that the measure is placed on a ballot. Development of a measure includes:

- ◆ Conducting research
- Obtaining endorsements
- Working with the media
- Evaluating and generating support
- Building a coalition
- Producing information materials
- Communicating with organizations and individuals
- Drafting and lobbying for passage of authorizing (state) legislation
- Drafting the local measure

Campaign phase and use of private funds: Once the measure is placed on the ballot, public funds can only be used to provide objective information on the measure to the public and cannot be used to influence voters. At this point, private funds will need to be raised to pay for a campaign and for campaign staff.

When Proposition A was placed on the ballot by the Los Angeles County Board of Supervisors, most staff who had worked to develop and draft the measure took leaves of absence from the public agency and worked directly for the campaign committee (YES on Proposition A, Citizens for Safe Neighborhood Parks).

For additional information, please see the discussion in Part III: Campaigns and Implementation.

THINGS TO REMEMBER

How much can public agencies do?

- Drafting phase vs. campaign phase
- Public funds vs. private funds

GETTING STARTED

- 1. Assemble capable staff
- 2. Budget wisely
- 3. Be organized
- 4. Keep careful records
- Develop your message: public relations material

GETTING STARTED

1. Assemble Capable Staff

It is vital that you have a capable, organized and knowledgeable project director and staff if you are serious about writing and passing a park, recreation or land conservation assessment measure. You should hire a project director or manager as well as additional staff as soon as possible, because the amount of information you will need to coordinate and produce will expand very, very quickly.

At a bare minimum, you will need a project director, research director, and office and operations manager. The project director should have experience in working with elected officials, government agencies and a variety of citizen's organizations, drafting legislation, and if possible, running campaigns.

Do not underestimate the amount of work you will need to do or the enormous number of details that you will need to coordinate. It is essential that you have adequate and qualified staff to keep the project on track, to gather the massive amount of information you will need, and to coordinate all the steps involved in drafting a local park assessment measure.

2. Budget Wisely

You should prepare an initial budget for your research and development phase, which includes all of the time prior to the measure being placed on the ballot. Nearly \$250,000 was spent on the research and development phase of Proposition A. This included a substantial amount for drafting the engineer's report. Few assessment districts are as large as Los Angeles County, so your needs may be less, but you will still need to make sure that you have expert legal review and expert preparation of your engineer's report. Make sure to research these costs well ahead of time. The engineer's report is too vital to cut any corners in its preparation, and legal review is essential to protect you from possible legal challenges. You may also be able to get help from staff in the agency who will administer the assessment district. Make sure to include at least the following in your initial research and development budget:

- ♦ Staff
- Office overhead and supplies
- Printing and postage
- Public opinion poll
- Engineers
- ♦ Legal counsel

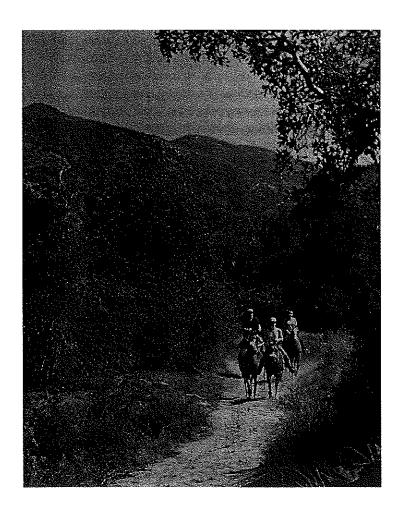
Note: These costs are only for the period of time before the measure is placed on the ballot. Other types of expenses are involved in the campaign phase, and you will need to prepare a separate campaign budget. See Part III: Campaign and Implementation.

3. Be Organized

It is vital that you maintain an extremely high level of organization. This may seem self-evident, but you will be amazed at the sheer volume of technical information that you both accumulate and circulate.

It is very important that you keep track of every piece of information you collect, and that you establish from the very beginning a filing system for both hard copies and computer files. The various technical steps involved in developing an assessment ballot measure overlap quite a bit, and, throughout the entire process, you will need to be able to find important data and background information on short notice.

There will also be a large and ever-expanding list of people,



Wilson Canyon, Angeles National Forest. Photo: Ernest Praun

GETTING STARTED

agencies and organizations who you will want to keep informed, and who will form your support base. You will need to keep track of your key contacts and supporters, as you will need their help in many different ways. It is well worth taking the time to create a good database at the beginning that will allow you to add key pieces of information regarding projects and contacts as you progress. This information is extremely important during the campaign phase for media contacts, public outreach, endorsements, advertising, etc.

Here are some examples of information you will want to include in your database:

- Project information (background, funding needed, controversy, description)
- Project contacts
- Geographic location
- Endorsements
- Supportive organizations

4. Keep Careful Records

Keep careful written and computer records of everything. Keep records of all your contacts, meeting notes and minutes, and copies of every draft of the measure you ever circulate. Make sure you keep track of all pertinent research information you gather and keep it all in one accessible place. Throughout the entire development and campaign phases you will be asked for information on many different items. You will also need to reference your own data as you prepare public information and PR material, and as you draft your measure. You will save huge amounts of time if you can easily access the information you need, including any relevant legal codes.

Don't throw away anything that could be relevant! *This includes successive drafts of legislation and engineer's reports.* There is plenty of time for clean-up later. We won an important legal dispute because we had copies of early drafts of the engineer's report and were able to find the information we needed.

5. Develop Your Message: Public Relations Material

I have included some examples of material we circulated during the development of Proposition A. We circulated similar materials in draft form (clearly marked DRAFT —very important) right from the very beginning. The purpose of this information is simple: Communication. *You* are responsible for getting elected officials, citizens' groups, civic leaders and other key individuals to understand what you are proposing and how they will benefit. You need as many of these groups and individuals as possible to support your measure, so it is well worth taking the time to

communicate with them.

It is therefore very important that you summarize the different aspects of your proposal and your measure so that they are easily comprehensible. More detailed technical information should be available to those people who need it. For example, if you are presenting information to athletic organizations, prepare a summary that focuses on the benefits to sports fields and other athletic facilities.

Remember, people will rely on you for information, so you need to do a good job of accurately presenting what you are trying to accomplish and why it is important. You also then have the opportunity to gain their support.

Here are a few pieces of information that you should prepare and make available:

- General summary explaining the measure and stating the need
- ♦ Answers to frequently asked questions
- Breakdown of funds to be included in the measure
- Brief description of projects to be included in the measure
- Outline of your state or local area's past park and land conservation measures (if relevant)
- ◆ Any other relevant background information
- ♦ Different summaries of key components of your measure that are of concern to special interests (e.g., natural resource protection and restoration projects, facilities for recreation and seniors, programs for at-risk youth)

Some examples are included in the appendix.

RESEARCH: WHAT DO YOU NEED TO KNOW?

Listed below are eight basic questions that you need to ask, and answer thoroughly, before you undertake any local financing or ballot measure.

It is very important that you do sufficient research in your own area, and that you carefully evaluate your chances for success. The results of your research will help you: 1) make the case for placing your measure before the voters; 2) build support for your efforts; and 3) prepare necessary materials and public information.

Careful research will also help you develop winning campaign themes once your measure is on the ballot, and will help you choose a dollar level of assessment that voters will accept. Running

RESEARCH

Fundamental Questions You Need to Ask

- What are your local park, recreation, and land conservation needs?
- 2. What are your funding options?
- 3. What is the voting history on similar issues in your city, county, district, or state?
- 4. What is your local fiscal and bonded indebtedness status?
- 5. Who will support you and who will oppose you?
- 6. Who are your voters and what do they think?
- 7. What level of assessment will voters support?
- 8. What themes, organizations and community leaders will have the greatest impact on voters?

RESEARCH

a strong and strategic campaign is vital to your chances of success. Since there is often very little time during a campaign, doing careful research early on really pays off later.

1. What are your park, recreation, and land conservation needs?

It is very important that you carefully assess your specific local (or statewide) park, recreation and open space needs before you begin to develop your measure. This will allow you to establish a basis for your efforts, and will also allow you to establish contact with a wide number of individuals and organizations in your area.

When we first considered placing a park funding measure before Los Angeles County voters, one of our initial actions was to conduct a detailed survey of park, recreation, coastal and natural lands' needs in the county. We surveyed all cities, the county parks department, and other park agencies in the county. The conservative dollar estimate of our local need for park, recreation and natural lands was well over \$2 billion! This survey identified our own specific needs locally, which included not only land acquisition but also a great deal of park development and improvements to existing park and recreation facilities.

In addition to the written survey we held numerous meetings all over the county. We met with representatives from nearly all of the county's eighty-eight cities, county departments, park-related citizen's groups and many other important organizations. This allowed us to directly assess our local needs and potential problem areas, and to begin assembling a specific project list. We also met with many different community groups of all types, political leaders and civic leaders.

Polling is also very important to help you determine park needs. Our initial poll helped us identify specific projects and purposes that voters care about. It is essential to know not only what you need in terms of parks, recreation and open space but also to be able to identify what types of projects voters will actually support.

2. What are your funding options?

It is important to establish early whether a local assessment is the best or most feasible funding mechanism available to you. The amount of money you need to generate will also determine which type of funding method makes the most sense. We explored a number of different financing methods before we chose an assessment district. We evaluated each method's ability to generate the amount of revenue we needed as well as the likelihood that each method we considered could successfully be approved by voters. The ability that a given funding method can win voter approval is clearly a determining factor. Polling will help you determine levels of voter support as well.

There are other types of funding mechanisms available for parks, recreation and natural lands which this manual will not address. After all of our research, we felt that an assessment was the most likely funding mechanism for our needs.

3. What is the voting history on similar issues in your city, county, district, or state?

You need to compile the past election results for natural resource-related ballot measures in your area and for other local funding measures (local sales taxes, utility taxes, bond measures, etc.) that have appeared on your area's ballots to gain an indication of the levels of voter support (or opposition) you can expect. Review your area's election results on all relevant state funding measures as well. If a measure failed, examine the reasons why.

- ♦ Which measures have passed?
- ♦ Which have failed?
- Passage or failure by what margins?
- Are measures more likely to be passed if they appear on a June or November ballot?
- Are measures more likely to be passed if they appear on a statewide ballot, rather than an off-year election ballot?

You need to carefully evaluate the levels of past voter support as well as poll results in making your determination to proceed.

One of our initial pieces of research was an exhaustive analysis of Los Angeles County's voting history. The results showed that county voters had a long record of strongly supporting funding measures for environmental purposes. Between 1964 and 1988, Los Angeles County voters approved twelve of seventeen statewide environmental funding measures which appeared on state ballots during that time.

We also reviewed all funding measures which had appeared on the county's ballot or on any city ballot in the county within the last ten years. The level of support we found, combined with our poll results, justified our going forward to develop a countywide assessment district.

4. What is your local fiscal and bonded indebtedness status?

You must be able to show that your city, county or state can afford to issue bonds in the amount you are proposing. Annual assessments will pay the principal and interest on bonds issued to fund land acquisition and capital improvements. You should also research the assessed value of property in your area, and what other fees or charges are currently being levied on property

RESEARCH

"You need to carefully evaluate the levels of past voter support as well as poll results in making your determination to proceed."

RESEARCH

REMEMBER:

You don't know all the answers, no matter how long you've been working in your area. A public opinion poll is essential. owners. You should find out the following things:

- ◆ Debt service of the agency who will administer the assessment district you are proposing. This means the percentage of the agency's general fund that is used to pay back bonds or other types of debt (both principal and interest) each year. Credit rating agencies recommend a level of not more than 5%.
- Credit rating of the agency by Standard and Poor's and Moody's (the nation's leading credit rating agencies).
 You can obtain this information by contacting these agencies or through most financial advisors.
- ◆ Total assessed value of property in your city, county, state. (Local Assessor's office, State Controller, State Board of Equalization.)
- Rate of change in assessed property value of your city, county, state over the last few years. (The State Controller and State Board of Equalization publish this information annually.)
- Existing assessments on property in your area, and amount and purpose of each.
- Any other funding measures or assessments being planned by your City Council, Board of Supervisors or State Legislature.

This information will help you carefully evaluate the fiscal status of the local agency considering a funding measure. You need to be able to clearly demonstrate that the agency is fiscally sound and



Kenneth Hahn State Recreation Area. Photo: Scott Parker can afford to issue assessment bonds or other types of debt, if applicable.

5-8. The Need for Polling

- 5. Who will support you and who will oppose you?
- 6. Who are your voters and what do they think?
- 7. What level of assessment will voters support?
- 8. Which themes, organizations and community leaders will have the greatest impact on voters?

These four questions illustrate why you need to conduct a public opinion survey, also called a poll. Accurate answers to these questions are critical to the success of your measure. It would be extremely difficult to answer these questions without polling, and you need to determine whether or not you have enough public support to make your efforts worthwhile. You also must determine early on which issues and potential projects are likely to be supported and which could cause you problems.

A good poll will survey the opinions of registered voters who are most likely to vote, and will indicate who is supportive and who is more likely to oppose your measure. An initial poll will tell you whether or not you have enough voter support to justify proceeding. The amount of funds you can generate for your park, recreation and open space projects will be determined by how much you can assess the typical property owner each year, so a poll is essential to test voter acceptance of different assessment amounts.

It is vital that you conduct public opinion surveys. We did several polls during a three year period to determine what types of projects Los Angeles County voters would support in a countywide park funding measure, what they would oppose, what level of overall funding they would support and how much they were willing to pay for the items they wanted. This information was absolutely essential to designing a measure that voters would actually support, and to ensure that the measure's contents would be positive and non-controversial.

While polls are a snapshot in time and are never a complete answer, they give you important guidance. Failure to conduct a professional poll is one of the most common and ultimately costly mistakes that people make. It is important to hire a professional pollster who can help you interpret the poll results in a logical and statistically relevant manner.

CITIZEN PARTICIPATION

A broad base of support is vital to the success of your measure, and it is important to build this coalition right from the very beginning. The coalition of support that you can build for

CITIZEN PARTICIPATION

- 1. Citizen's Advisory Committee
- 2. Local meetings
- 3. Work with potential opposition: start early!

CITIZEN PARTICIPATION

preserving and improving your area's park, recreation and natural resources is as important as the funds your measure will generate.

1. Citizen's Advisory Committee

The Advisory Committee will be the foundation for your efforts, and each member should understand that they are expected to help develop this measure and build support for it. The Advisory Committee should include a wide range of representatives, from both the public and private sector. Hopefully, some of the committee members will also form the basis for your campaign committee once the measure is placed on the ballot.

Here is a list of some areas of interest you should have represented by the members of your Advisory Committee:

- Parks and recreation
- Conservation and wildlife
- Tree-planting
- Planning
- Senior citizens
- ♦ Inner-city and gang prevention
- Youth employment (such as conservation corps)
- ♦ Beach, coastal, wetland, river, mountain, or agricultural land conservation (as each applies to your area)
- City representatives
- ◆ Builders, developers and realtors
- ♦ Business community (local Chamber of Commerce, etc.)
- Civic leaders

Your Citizen's Advisory Committee should meet regularly throughout the development of your measure. They should be sent detailed agendas and any background material you want them to review prior to each meeting.

Use your Advisory Committee to address specific questions that are important to making your measure work. The Advisory Committee should approve the criteria you establish for specific projects, the final list of projects and the draft of the measure that is presented to the governing body responsible for placing the measure on the ballot. The Advisory Committee should also help you gather endorsements and build support for placing the measure on the ballot.

2. Local Meetings

You should develop your measure with the frequent input of the

agencies and organizations that will be affected by it. Their involvement is important to ensure both the placement of the measure on the ballot and the community's support during the campaign. The more organizations you include, the greater your support will be as you proceed. You should plan on meeting individually with every local agency that will be affected by your assessment district, and with every special interest group you can think of.

You will also need to meet regularly with each member of the governing body (or their staff) responsible for placing your measure on the ballot. We held literally hundreds of meetings throughout the research and development phase of Proposition A. We also stayed in close contact with each County Supervisor's office and every county department that would ultimately be involved in implementing Proposition A.

3. Work with potential opposition: start early!

It is important to talk to representatives from groups who could otherwise oppose you, and to find out what their concerns are. You should meet with the leaders of those groups, and try to address their concerns if you can. Continue to meet regularly with these groups throughout your planning and development process. You may be able to address most of their concerns, and regular communication will at least alert you to potential problem areas.

LEGISLATIVE AND LEGAL REQUIREMENTS

This section applies to California, and to local agencies within California. It may or may not apply in other states. You will need to review the assessment laws specific to your state to determine whether or not you can develop a measure similar to Proposition A under your existing state laws. You may need to amend your state laws to make the process work smoothly, and to add the requirement of voter approval. You may need to amend state law even if you are a local agency in California.

1. Require Voter Approval

If you determine that you need to amend existing state law to make your measure possible, you should seriously consider including a requirement for majority voter approval. You will avoid myriad problems by doing this. Many attempted local assessment districts were hotly contested in 1989-90 all over California. One of the major reasons was that people being assessed did not feel they had any real say in the matter. In California, assessments currently do not require voter approval. Providing a voter approval requirement will help prevent a tremendous amount of controversy and opposition.

LEGISLATIVE AND LEGAL REQUIREMENTS

- 1. Require voter approval
- 2. Public notice requirements
- 3. Summary of Prop A's enabling legislation
- 4. Provisions included in the enabling legislation (SB 659 Hill)

LEGISLATIVE AND LEGAL REQUIREMENTS

If you decide to go forward under state law that does not require voter approval, you should hold an advisory vote anyway. The best thing to do in this case would be to develop and draft your measure as if you were planning for a true election, and then run a campaign to gain the highest vote possible on the actual measure, which would include a list of projects. If you receive over 50% of the vote, you then have a mandate to proceed with the plan and projects you have put together, even though the vote is not binding.

2. Public Notice Requirements

Requiring an election to approve formation of the assessment district is a good alternative to the current public notice provisions in the Landscaping and Lighting Act and elsewhere in California state law. An election provides far more people the opportunity to express their opinion via the ballot box than does a majority protest or other type of public hearing.

If you proceed with state legislation and/or and assessment district of your own, you will need to address public notice requirements. Careful legal review is very important, as this is a critical issue. Since the time that our enabling legislation was signed into law, significant changes have been made to the notice requirements in the Landscaping and Lighting Act and in portions of the Government Code (see Government Code Section 54954.6). There is no longer a published notice option in the Landscaping and Lighting Act. Except for regional park and open space districts formed under Public Resources Code Section 5500, the Landscaping and Lighting Act currently requires first-class mailed notice to all property owners in the proposed district who will be assessed, at least 45 days prior to a majority protest hearing.

3. Summary of Prop A's Enabling Legislation

We needed state legislation to accomplish the goals of Proposition A. As discussed in Part I, in order to form a countywide assessment district, we had to form a special district which included all the incorporated and unincorporated areas of Los Angeles County. This special district—in our case, a Los Angeles County Regional Park and Open Space District—could then in turn form an assessment district using the Landscaping and Lighting Act (CA Streets and Highways Code Section 22500 et seq.). The assessment district, administered by the Regional Park and Open Space District, could levy assessments in all areas of the county, because the Landscaping and Lighting Act allows special districts to levy assessments within their jurisdictions to raise funds for park, recreation and open space purposes.

We formed the Los Angeles County Regional Park and Open Space District under existing state law (CA Public Resources Code Section 5500 et seq.). Regional Park and Open Space District's are able to form assessment districts and levy assessments under existing state law.

State legislation was necessary to address the county's specific needs in forming a countywide regional park and open space district and in levying the assessment under the Landscaping and Lighting Act. State legislation was introduced in early 1991 (SB 659 - Hill) and was signed into law by Governor Wilson in October of 1991 as Chapter 823 of statutes of 1991. Passage of this law made Proposition A possible. The legislation was authored by Senator Frank Hill (R-Whittier), and amended the portion of the California Public Resources Code that deals with regional park and open space districts (Sec. 5500 et seq.).

The legislation added certain key requirements to the process of levying an assessment, such as the requirement for majority voter approval (see following detail). The legislation also made changes in how the Landscaping and Lighting Act specifically applied to the Los Angeles County Regional Park and Open Space District. Because of the new restrictions the legislation placed on the park district's use of assessments, certain portions of the Landscaping and Lighting Act were no longer applicable.

4. Provisions included in the enabling legislation (SB 659 - Hill)

- ◆ Allows the Board of Supervisors to initiate proceedings to form a regional park and open space district (the "park district") through a county resolution, in lieu of the otherwise required petition process
- Allows consolidation of the hearings required to form the regional park and open space district and levy the assessment
- Requires four weeks of published notice for above hearings
- Combines formation of the park district with formation of the Landscaping and Lighting Act assessment district (otherwise two distinctly separate steps)
- Restates the provision in the Landscaping and Lighting Act allowing assessments to be assessed using any formula or method which fairly distributes the assessment among all assessable lots or parcels in proportion to the estimated benefits to be received by each lot or parcel
- Requires a resolution to be placed before county voters that includes: a specific expenditure plan for the funds generated by assessments the park district levies; rate and method of assessment; and an allocation of all funds generated by the park district

LEGISLATIVE AND LEGAL REQUIREMENTS

- 1. Research
- 2. The Engineer's Report
- 3. Rate and Method of Assessment: Benefit to Property

- Requires majority voter approval of the assessment, the assessment amount, the formation of the park district, and the specific expenditure plan; consolidates these items into one ballot measure
- Requires the amount of the assessment to be fixed in the measure, and establishes a sunset date for the assessments
- Requires subsequent voter approval to change the assessment in any way
- Specifies the Board of Supervisors as the governing body of the park district; directs the county to staff the park district; allows reimbursement to the county for cost of services and facilities
- ◆ Requires that a minimum of 80% of all funds generated annually by the park district be used for capital outlay projects; limits the amount available for administration of the park district to 5%; allows 15% to be used for operations and maintenance of facilities bought or improved with funds from the measure
- ♦ Requires that an annual report be submitted to the Board of Supervisors that describes changes in number and use of assessed parcels, distribution of funds generated by the district and a summary of the current fiscal status of the district
- Makes important legislative findings establishing a level of benefit to all properties in Los Angeles County from the park, recreation, and open space acquisitions and improvements included in Proposition A

ENGINEER'S REPORT

The engineer's report is a formal document usually prepared by an assessment engineer and required by state law to form an assessment district. The report must establish how the properties being assessed will benefit from the improvements (acquisition, development, improvement or restoration of park, beach and natural lands and recreation facilities) that will be paid for by the assessments. The report establishes the rationale for the rate and method of assessment, which means the actual amount of the assessment on a typical piece of property and the exact formulas used in assessing different types of property.

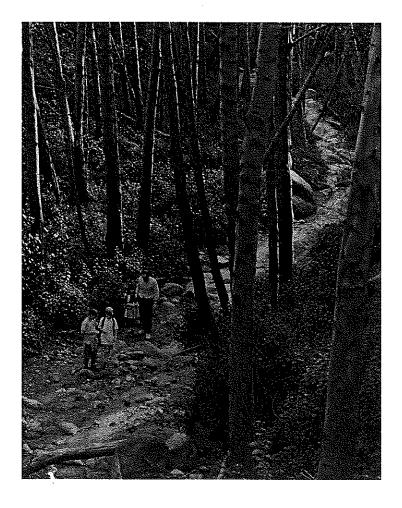
The contents of the engineer's report are very specific and are set out in state law. The report consists of a description and map of the boundaries of the district, a description of the improvements (acquisitions, etc.) you intend to make, a cost estimate and the rate and method of assessment. Our report was nearly forty pages. This

report must be formally presented for approval to the governing body who will administer the assessment district.

TIMING IS EVERYTHING! Make sure you carefully review the legal timeline requirements for presenting the engineer's report to your governing body.

This report, as the name implies, should be written by an engineer with experience in assessment districts. There are engineers whose specialty is developing the rationale and mathematical basis for assessments, and there is a tremendous body of knowledge regarding the technical aspects of assessing property to raise funds for various types of improvements. While an engineer's report can be prepared by someone other than an engineer, bear in mind that this is the document that establishes the rationale for the rate and method of the assessment, and therefore establishes the legal basis for your district.

When you select the engineer, you should try to find someone who is familiar with your geographic area and the governing body to whom the engineer's report will be presented. It is helpful, although not necessary, to find an engineer who is familiar with assessments for park and recreation purposes. It is far more important to hire an experienced assessment engineer whose previous assessment methods have been sound and successful. Preparation of an engineer's report can be costly, so investigate



Angeles National Forest. Photo: Ernest Braun

"As with legal counsel, you cannot afford to cut corners on the engineer's report."

your options early.

As with legal counsel, you cannot afford to cut corners on the engineer's report. Careful legal review of the engineer's report is a must!! Your report and the assessment rate and method should be carefully reviewed by an attorney very familiar with the legal issues of assessments and assessment districts. If this technical report is not properly prepared, the ballot measure you prepare could be invalidated by the courts even after it is approved by the voters.

Under the California Landscaping and Lighting Act, a draft engineer's report is presented at an initial hearing to the governing body of the agency who will form the assessment district. At this time, the governing body sets a date for a public hearing on the engineer's report. At the public hearing, the governing body can approve the final engineer's report. If you are preparing to submit your assessment to the voters, as we did, the engineer's report must be approved by the governing body of your agency prior to the measure's placement on the ballot. The specific requirements regarding the formation of Los Angeles County's assessment district required final approval by the voters of the formation of the assessment district, and of the rate and method of assessment.

Note Leave yourself enough time to carefully prepare the engineer's report and the assessment rate and method. Also make sure to leave enough time for the necessary hearings on the engineer's report, and be prepared for those hearings to be extended by your governing body.

Following is a description of the Engineer's Report prepared for Proposition A.

1. Research

Before we hired an engineer to draft the report, we compiled a vast amount of information on property and assessments in Los Angeles County. Our research included the following:

- Detailed analysis and tally of different property types and parcel classifications in Los Angeles County
- In-depth study of the county's land use codes, number of parcels per land use category, and the organization of the county's assessment roll on computer
- Detailed analysis of computer data
- Review of existing assessment districts in the county and the rate and method of assessments
- Extensive discussions with legal experts on assessments and related case law
- Extensive discussions with various parcel and land use experts in county departments

This information was important to determine what type of assessment method would actually be possible to implement in Los Angeles County, and to understand how the county's assessment roll and parcel information were organized. You cannot develop a sound assessment rate and method without understanding these issues. You can save a great deal of time and money by carrying out this research yourself, rather than relying on an (often expensive) assessment engineer to do it for you. *You* need to understand these details, as you will have countless conversations about the technical details involved in your assessment method and engineer's report. BE PREPARED!

There are experts within the Office of the County Assessors, the Department of Public Works and sometimes the Office of the Treasurer and Tax Collector who can help you find and understand all of the information listed above.

2. The Engineer's Report

Our draft engineer's report was prepared jointly by BSI Consultants, Inc. and Willdan Associates, two of the largest engineering firms in Southern California with the greatest amount of experience in assessment districts. The report includes the following components:

- Description of the boundaries of the proposed assessment district
- Detailed description of all improvements (i.e; acquisition, development, restoration of parks, beaches, recreation facilities)
- Estimate of all costs involved in funding the proposed improvements
- Analysis of benefit to the properties being assessed
- Rate and method of assessment

We purchased the county's assessment roll on computer tape, and the engineers applied various formulas on the tapes throughout the development of our assessment rate and method. This allowed us to estimate as accurately as possible the total dollar amounts we could generate annually from different assessment formulas. This process was extremely important to accurately determine the amount of bonds that could be issued for capital outlay projects. The total dollar amount of projects ultimately included in Proposition A (\$540 million) was based directly on the amount of assessment revenue we estimated could be generated each year throughout the life of the assessment. This annual total amount was based on a monthly assessment rate that our public opinion poll showed voters would be most likely to accept. See the engineer's report summary in the Appendix.

3. Rate and Method of Assessment: Benefit to Property

It is important to reiterate that, in an assessment district, the property being assessed must derive special benefit from the improvements made with funds from that assessment. The amount of assessment must be apportioned among property in the assessment district in proportion to the amount of benefit each type of property will receive from the improvements. It is the engineer's job to fairly distribute the assessment among all assessable lots or parcels in proportion to the estimated benefits to be received by each lot or parcel from the improvements. The engineers must explain the rationale upon which this benefit is founded, and to quantify the different levels of benefit for different types of property.

The Landscaping and Lighting Act and our enabling legislation allows assessment engineers to use any reasonable method or formula which fairly distributes the assessment among all assessable lots or parcels in proportion to the estimated benefits to be received by each lot or parcel from the improvements paid for by the assessments.

Benefit from specific projects: We designed our assessment district so that all property in the district, regardless of the property's location, would benefit from the improvements (land acquisitions, park development and restoration, etc.) funded by the assessments. The engineer's report includes a detailed list of specific park, recreation, beach and natural land capital improvement projects located throughout the district. These projects were specifically written into Proposition A, and the engineer's report includes a description of each project to be acquired, constructed, developed and/or restored with funds from the measure.

There are three general classes of projects funded by the assessments:

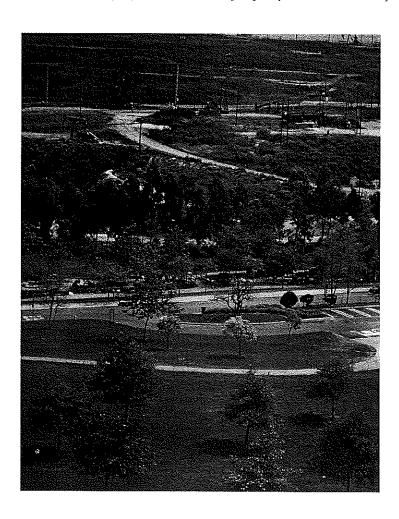
- 1) Regional facilities which benefit every parcel in the district, such as county regional parks, beaches, large open space areas, mountains, etc;
- 2) Regional facilities which benefit large areas of the district; and
- Neighborhood facilities which benefit smaller, more local areas of the district but which are still regionally significant.

The park, recreation and open space projects are distributed between these different categories of regional use to ensure that all areas of the district benefit; funds for improvements are also distributed throughout all geographic areas of the district, and between all of the cities and the unincorporated area of Los Angeles County. Each project included in Proposition A was required to be of regional significance and use, and had to show documentation of both. Resources and parks of importance to local neighborhoods also had to show that they were regionally significant. This documentation included:

- Evidence that the project was a significant natural resource;
- ◆ Letters or studies documenting the regional use of the proposed project by surrounding communities;
- Evidence that the project was or would be made available on a regional basis; and
- Evidence that the project was the only one of its kind in the surrounding region.

Funds available for district-wide competitive purposes fit category 1) above; funds available to all cities based on their percentage of all parcels in the district fit in categories 2) and 3) above.

The engineer's report made a number of findings which demonstrated that these park, recreation, and open space improvement projects benefitted property owners in many specific



Engineer's Report

Kenneth Hahn State Recreation Area. Photo: Rob Badger

Engineer's Report

ways, including increased economic value, improved quality of life, enhanced environmental quality, increased safety and usability of facilities and expanded recreation opportunities.

Benefit to land and to different types of land uses: The method of assessment developed by the assessment engineers at BSI Consultants, Inc. and Willdan Associates differentiates between 1) the benefit from the proposed park, beach and recreation projects to land itself; and 2) the benefit to improvements on the land (house, apartment, type of commercial/industrial facility —each a different land use category).

- 1) Land: Benefit to the land is based on parcel size; larger parcels benefit more than smaller parcels.
- 2) Improvements on the land: We used a point system to evaluate the benefit to improvements (house, apartment, commercial/industrial facility) on the land. This point system was divided into the following components of benefit:
 - ◆ Economic Value: increase in property value, or economic benefit
 - ♦ Environmental Quality: increased environmental quality of a region
 - Recreation Enhancement: enhanced recreation opportunities

Each land use category (home, apartment, commercial/industrial) on the county's assessment roll was evaluated based on whether it receives one or more of the benefits reflected in these components, and points were awarded accordingly. For example, a parking lot received less points than did an office building, since the property value of a parking lot is not affected by park improvements, nor does a parking lot receive any benefit from enhanced recreation opportunities.

There are three different land use categories on the Los Angeles County assessment roll:

- ♦ Single family residence
- ♦ Multiple-family residence
- ♦ Commercial/industrial

Since the majority of parcels in the county are zoned single family residential, the assessment method uses this type of land use as the standard. The benefits to other types of land uses are then based on this standard. **Exempt properties:** Several land uses were determined to be exempt from the assessment, primarily because they do not benefit from the proposed park and recreation improvements. These include common areas, open spaces, greenbelts, public properties, agricultural lands, lands with conservation easements, vacant lands greater than five acres and that portion of any partially-improved, single parcel greater than five acres which is not being used.

For more information, see the Appendix, Summary of Engineer's Report.

LEGAL REVIEW

There are numerous legal issues involved in creating an assessment district and in designing a sound assessment rate and method. This manual does not attempt an in-depth discussion of these issues. However, should you decide to proceed with an assessment district of your own or with state legislation to allow you to do so, you should make sure to get expert legal counsel with experience in assessment districts and assessment case law. This is particularly important in the preparation of your engineer's report, as this document is critical. A list of relevant court cases is provided in the Appendix.

You will also need careful legal review of any legislation you prepare. We were very careful to ensure detailed legal review of our enabling legislation and ballot measure by county counsel as well as by outside counsel with expertise in assessment case law, forming assessment districts, issuing assessment bonds and litigating assessments.

GETTING ON THE BALLOT

It is very important that you pay attention to every detail in your local measure, as it will be the law that governs your assessment district and your specific projects. Once your measure is passed by the voters, you want things to go as smoothly as possible. In general, the structure of Proposition A is very similar to Proposition 70, the statewide state park bond act placed on the ballot through the citizen's initiative process in 1988. Because California has a sixty-year history of park bond acts, we used the language from previously successful measures as much as possible. Prop 70 is the most recent successful state park bond act, so we used that measure's inclusion of specific projects as a model.

Although Proposition A is funded by assessments on property, bonds will be issued initially to pay for the specific projects, so there are many similarities to previous park bond acts. Of course, we had to modify many portions to address our specific type of funding method and our own local needs. State park bonds are

GETTING ON THE BALLOT

- 1. Contents of Proposition A
- 2. Specific Projects
- 3. Endorsements

GETTING ON THE BALLOT

general obligation bonds and are paid back through the state's general fund. Bonds issued by an assessment district are a type of revenue bonds called assessment bonds, and are paid back by the assessment revenue.

It is important to use language from other measures whenever you can because it will make your measure much more credible and will save you tremendous amounts of time. Make sure to carefully examine the way other measures have been put together. You will want to include all the specific language necessary to ensure that your measure can be properly implemented and administered once it is passed. You can also avoid problems that other measures may have encountered.

Once again, legal review is very important! You will also want to make sure that your Advisory Committee, relevant county departments and all applicable public agencies are reviewing drafts of your measure. You should make sure that all involved elected officials are also given the opportunity to review your measure.

1. Contents of Proposition A

The contents of Proposition A were modeled directly after the most recent successful statewide park bond act, citizen's initiative Proposition 70, and included the following funding categories:

- ♦ Specific regional park projects within the county
- ♦ Discretionary funds for county parks
- ♦ Countywide competitive funds for:
 - Trails
 - Senior facilities
 - Urban tree-planting
 - River and stream restoration
 - Graffiti prevention
 - At-risk youth facilities
- County beaches
- Santa Monica Bay restoration and clean-up
- Discretionary funds to all cities on a per parcel basis
- Specific regional park projects within cities
- Preservation of regional mountain and canyon parks

Proposition A also includes extensive language regarding the implementation and administration of the measure, bond issuance and administrative costs. See Part IV: Appendix for a copy of the measure, and see the summary of Proposition A and the Proposition A project list for more detail.

2. Specific Projects

Proposition A includes over 100 specific park, recreation, coastal and natural land conservation projects. These projects were written into the text of the measure with specific dollar amounts, a general description of the area to be acquired or the facility to be developed or restored, and an identified public agency to administer the project. These projects cannot be changed or altered unless, after a required number of years, a project is unable to be completed. These projects include acquisition, development, restoration and/or rehabilitation of park, recreation, wildlife, coastal, trail or natural lands or facilities; all projects must be for capital outlay only.

Because of the nature of our funding method, there was an extremely strong legal reason for including these projects (see discussion under Part II: Engineer's Report). Inclusion of these projects also ensured a fair geographic distribution of funds and helped build the support necessary to get the measure on the ballot, mount a successful campaign and win voter approval. Polling showed repeatedly that people were willing to pay additional taxes, fees or assessments if they knew how the funds would be spent, and if the funds were to be spent on projects or programs they cared about. Voters want to know how their neighborhood or community will benefit.

Criteria for Inclusion of Specific Projects: Specific criteria were established to identify regional park and recreation projects throughout Los Angeles County which would benefit all or large areas of the proposed assessment district. Each specific project had to meet specific criteria in order to be considered for inclusion in Proposition A.

Eligible projects were required to be:

- A sound environmental, park or recreation project with good reasons for being preserved, acquired or improved;
- Non-controversial; have support of landowners if applicable;
- Available; have willing sellers if project is an acquisition;
- Of regional significance (see below);
- Part of a local or county general plan;

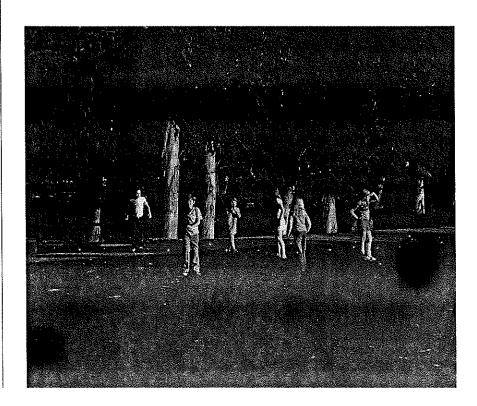
GETTING ON THE BALLOT

- Supported by government: have city council support through a resolution;
- Supported by citizens: have strong written support from local conservation, neighborhood, civic, or other organizations;
- Well stewarded: have an entity willing to operate and maintain the area once it is acquired or developed for park, recreation, or open space use.

Regional significance had to be documented through as many of the following as were applicable:

- Evidence that the project was a significant natural, park or recreational resource;
- ◆ Letters or studies documenting the regional use of the proposed project by surrounding communities;
- Documentation that the project is or will be made available or advertised on a regional basis;
- ♦ Evidence that the project is the only one of its kind in the surrounding region; i.e., the only pool, sports facility, etc.

We were adamant about receiving City Council resolutions of support. At the very least, the City Council had to support inclusion of the proposed project in the measure. Projects without official



O'Melveney Park, Los Angeles. Photo: TPL support in writing from the City Council were not eligible for inclusion in the measure. We were also adamant about receiving regional documentation; in one case, we received several hundred letters from senior citizens all over the county who used a particular senior facility! We also received letters from people in other states in support of natural area preservation projects.

All groups and agencies should be informed well in advance as to how the selection process will work. Information on each proposed project should be compiled and sent to the Advisory Committee prior to the meetings at which they will be considering the various projects. The Advisory Committee should make the final decisions about which projects will be included in your measure.

Reviewing Project Applications: It takes a tremendous amount of staff time to review all project applications, to collect the inevitable missing documentation and to compile all information on each project. You and your staff will need to review each project and establish a project contact person. This person can be a local citizen or someone within a local park and recreation department. He or she should be willing to get any additional information you might require and to serve as the key project contact throughout your development and campaign phases. In some cases, you or your staff will need to actually visit the project and meet with the project sponsors.

If you have any doubts about the controversial nature of a project, check it out! You cannot be too careful here. You do not want to find out you have a problem after your measure has been placed on the ballot and it is too late to make any changes. Other agencies and park and conservation experts can usually help you identify potential problems, so make sure you circulate your project list widely. Allow enough time for thorough review of your projects and your draft measure by all those involved. You can build additional support by including individuals, organizations, and public agencies in the process, which will also diminish the possibility of being accused later of excluding anyone.

Make sure that all agencies and organizations with whom you are working have a chance to review the entire draft of your measure, including the list of specific projects. Make sure you have substantial legal review, and that all departments of the jurisdiction (city, county, district) who will administer the measure once it is passed have adequately reviewed the measure.

Handle all problems now! Once the measure is placed on the ballot it is too late.

4. Endorsements

You can work on endorsements of your projects and of the concept of your measure throughout the research and development

GETTING ON THE BALLOT

"Any project that is at all controversial should be rejected."

GETTING ON THE BALLOT

phase. Organizations and public agencies can take positions supporting the measure itself, placement of the measure on the ballot, and specific projects. You should try to gather as many endorsements as possible, as it will make the campaign phase much easier. Some groups have a very long lead time for deciding on their endorsements, so you cannot start too soon.

Here is a list of individuals and groups whose support you should solicit:

- ♦ Park and recreation groups
- Conservation groups
- Senior citizen groups
- ◆ Law enforcement leaders and organizations
- Business groups and local chambers of commerce
- Civic and service groups
- City governments and leagues of cities
- Homeowners groups
- Legislators and other elected officials
- Labor unions

Controversy can kill your measure before you ever have a chance to make your case to the voters. The time to control controversy is during the drafting of your measure. You cannot be too careful! Remember: you need voter approval.

The case for additional polling: It is a good idea to poll again as you assemble your measure, before the measure is finalized and placed on the ballot. You need to make sure that you are including at least some specific projects or programs that have strong support among the voters you will most need to reach in a campaign. Conversely, you also need to make sure that you are not including any projects that have significant negative aspects.

Your projects and endorsements will form the basis for a campaign that should help win voter approval of your measure. You need to think about what will be needed in the campaign phase while you assemble the contents of, and support for, your measure.

Polling will help determine campaign themes and will also identify potential problem areas. A second poll close to the time your measure is actually placed on the ballot will reflect any significant changes that may have occurred since the time of your first poll. Natural disasters, national and state political issues and many other events can significantly affect voters' opinions. A poll helps you stay in touch with those opinions, providing crucial information for a campaign.

PART III:

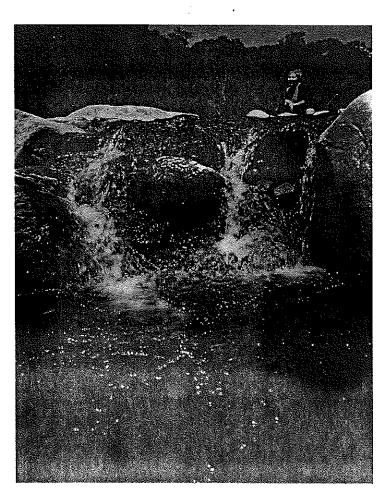
CAMPAIGN AND IMPLEMENTATION

- Campaign
- ♦ Now You Have the Funding: Can You Make it Work?

CAMPAIGN

The Goal is to win! (And have some fun doing it.)

You must plan on running a very organized campaign once your measure is placed on the ballot. As mentioned several times previously, you should be thinking about and planning for this stage early on in the process. If you have a friendly and supportive local nonprofit organization, this group could be the main force in preparing for the campaign. Once the measure is placed on the ballot, public funds and staff time can only be used to provide objective information on the measure. Public funds and staff time cannot be used for campaign purposes.



CAMPAIGN

- 1) Ballot title
- 2) Ballot arguments and signers
- 3) Fundraising and campaign budget
- 4) Polling
- 5) Campaign staff
- 6) Endorsements
- 7) Media
- 8) Communication with voters: campaign mail
- 9), Campaign reporting and legal counsel

Gold Creek, Angeles National Forest, Photo: Ernest Braun

CAMPAIGN

Pay attention to California campaign laws and campaign reporting requirements! You need to plan an aggressive strategy for your campaign based on your polling data, your measure and your knowledge of the local area. We hired a campaign consultant and a direct mail consultant, and their expertise proved invaluable.

If you have made it this far, you should have a well-thought out, strongly supported and non-controversial measure. Once the measure is on the ballot, it is your job to sell the measure to the media, opinion leaders, the business community and all other key groups of voters you will need to reach.

Pay attention to California campaign laws and campaign reporting requirements. You will need to retain campaign legal counsel, and someone who can handle campaign reporting requirements and all your bookkeeping. There are many legal and bookkeeping issues involved in campaigns, and you need to be sure you are handling these correctly. All campaign expenses and contributions must be reported in a specific way and according to an established timeline. The California Fair Practices Commission will levy severe fines against violators of campaign reporting laws. Make sure to set up your campaign correctly!

Hire experience: The results of all your efforts, and those of many, many people, will hinge on your work during these few, critical months. This is not the time to take chances. Hire staff and/ or campaign consultants with experience in running ballot measure campaigns.

This is a marketing campaign: You need to sell this measure to the voters whom you have identified as those you most need to reach. You also need to coordinate your message. All your volunteers, supporters in local areas and those speaking to the press or making public presentations should communicate the same message, which should be determined by your campaign director and campaign team.

There are many parts of a campaign. What follows is a discussion of some of the key components:

1. Ballot Title

The few words of your ballot title, or label, are the most important words that will be written about your measure in the entire campaign.

The ballot label consists of the wording that appears next to the box which voters mark Yes or No; these are the only words that all voters will see. Pay attention to the drafting of the ballot language when you are drafting your measure, and use your polling data! The ballot title should be included in the ordinance the governing body approves for placement on the ballot.

2. Ballot Arguments and Signers

Each county mails to each registered voter a ballot pamphlet containing all measures on local ballots. This pamphlet includes arguments for and against each ballot measure; the arguments are prepared by the supporters and opponents, respectively, of each measure. As the supporter of your measure, you should prepare as strong an argument as you can. Your polling data should guide the arguments and words you use, as well as the signers of your arguments.

The ballot arguments supporting your measure and rebutting the opposition argument, and the people and organizations who sign these arguments are the second most important items in the entire campaign. These arguments should be carefully written to reflect the strongest points of your measure. Again, use your poll! More voters will look at these arguments, and at who has signed them, than at anything else you will do. You should pick your signers carefully.

This process is very time-consuming, and, once the measure is approved by the governing body to be placed on the ballot, you will only have a set period of time in which to prepare these arguments. There are many specific forms required, and the due dates are inflexible, so be sure to keep a meticulous record of everything you need.

Start early and check with your Registrar of Voters or Elections Clerk for your area's election regulations and timelines. Each county Registrar of Voters can establish different timelines, so check into this well ahead of time!

Again, this is one of the two most important items you will prepare during the campaign, so it is worth devoting a great deal of time to do it correctly.

3. Fundraising and Campaign Budget

You need to raise enough money for the campaign phase to advertise your measure to your key voters. This amount will vary with each area, so you will need to consult campaign experts to determine your needs. Don't shortchange yourself! One of the greatest mistakes you could make would be to succeed in getting your measure on the ballot, only to have it lose because you did not raise enough money to run an adequate campaign. You must determine early on how much money you will need to run a decent campaign in your area, and plan a strategy for raising at least that amount.

Don't wait until the last minute to fundraise. Plan your efforts early. Your campaign budget should include at least the following:

- Campaign staff
- Office overhead and supplies

CAMPAIGN

CAMPAIGN

Among the key endorsements secured for Prop A were:

- American Assn. of Retired Persons (AARP), CA State Legislative Committee
- Congress of California Seniors/ L.A.
- Los Angeles City Police Chief Willie L. Williams
- Los Angeles County Sheriff Sherman Block
- Peter Ueberroth
- California Organization of Police and Sheriffs
- Los Angeles County Police Chiefs Association
- League of Women Voters, Los Angeles County
- Los Angeles Area Chamber of Commerce
- ♦ League of Cities, Los Angeles County
- Contract Cities Association
- Independent Cities Association
- ◆ LA County Federation of Labor (AFL-CIO)
- LA County Building and Construction Trades Council
- ♦ Los Angeles Audubon Society
- Sierra Club Angeles Chapter
- Atlantic Richfield Company (ARCO)
- Southern California Edison

- Printing and postage
- Media and advertising
- Polling
- Campaign and mail consultants
- Campaign reporting and bookkeeping
- Campaign legal counsel

4. Polling

You may want or need to conduct a poll before you design your campaign, in order to fine-tune your efforts. This should be a poll in addition to any you may have conducted prior to the measure being placed on the ballot. See discussion under Part II: Research: The Need for Polling.

5. Campaign Staff

You will need them! A campaign is very fast-paced and demanding, and you will need staff that are willing and able to respond quickly to a huge variety of needs and emergencies. There is no such thing as a 40-hour work week during a campaign. The Proposition A campaign employed five fulltime people, in addition to a campaign consultant and a direct mail consultant who employed his own staff. Be prepared, and plan for the staff element of your campaign early.

6. Endorsements

Endorsements have been discussed in detail throughout this manual. During the campaign, all the work you have done earlier in building support for your measure will bolster your efforts. Identify the groups and individuals whose support is most important to the success of your campaign, and do everything possible to secure those endorsements. You also want to make sure that you have a broad-based endorsement list, so mail endorsement requests to all the organizations you possibly can.

Proposition A was endorsed by over 400 business, park, law enforcement, youth, conservation, senior and civic organizations from throughout the county. Proposition A was also endorsed by sixty-seven cities and numerous elected officials.

7. Media

Editorial Boards: You should plan on trying to get the editorial endorsements of your local newspapers. Do your research so you know what issues are important to each paper. Again, your local specific projects are your best selling points. Endorsements of local

organizations are particularly useful as you make your case to editorial boards and writers. Make sure you know what geographical area each paper covers, its editorial positions in the past on park or conservation-related funding issues, and how much money your measure allocates to the area the paper covers.

Identify key people to meet with editorial boards. It is important to look at each editorial board individually, and choose the best people to meet with each board. You should always include someone representing the campaign, as well as local leaders for meetings with local editorial boards. You should also be sure to provide materials on your measure, including background information and local information for each meeting.

Local Articles: Local groups and supporters of specific local projects can be very helpful in getting media coverage in their neighborhood or town papers. Smaller papers often tend to cover local issues if you make an effort to contact them and provide them with good information.

Television and Radio: We did not have enough money to buy television time, and decided against purchasing radio time. You can try to get free media coverage if you have the time and volunteers, or if your local media is normally interested in park, recreation or land conservation issues. Smaller communities may be able to afford local television and radio time, but you need to carefully evaluate the benefits and negatives of these types of advertising.

8. Communication with Voters: Campaign Mail

Campaign mail will probably be your primary means of reaching key voters. This is definitely an arena for someone with substantial experience in designing, drafting and producing campaign mail. All of your efforts throughout the entire development of your measure will come into play as you design your campaign mail. The design of your measure, the specific projects, your endorsements, previous press coverage and editorial board support are all extremely useful in campaign mail.

Because campaign mail varies tremendously with each area, ballot and measure, it is impossible to lay out a generic plan. Please note that this is likely to be the most effective way of reaching voters, so you need to devote plenty of time and effort to designing this part of your campaign.

9. Campaign Reporting and Campaign Legal Counsel

As discussed earlier in this section, you need to be prepared to meet all California campaign laws and campaign reporting requirements. This is a complex and frequently-changing area, so make sure you hire someone with experience in California election

CAMPAIGN

REMEMBER:

Coordinate your message for all parts of your campaign.

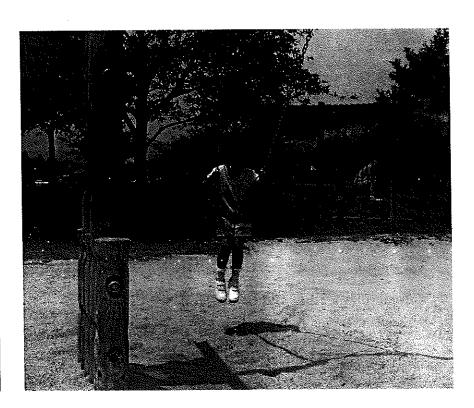
IMPLEMENTATION

laws and campaign reporting.

IMPLEMENTATION: Now You've Got the Funding, Can You make it work?

Once your measure has been approved by the voters, you need to make sure that it is properly implemented by the administering agency. There will be numerous questions, and sometimes unforeseen difficulties in implementing a new measure. You will need to make sure that your measure is actually implemented in a timely fashion, and that the governing body is in compliance with all relevant laws.

Don't assume that the administering agency knows all the details of your measure. Particularly in the first few months to a year, it is important that you and others familiar with the measure pay attention to implementation. You will want to ensure that implementation goes smoothly, and take action if it does not.



Baldwin Hills Park, Kenneth Habn State Recreation Area. Photo: Scott Parker



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